Excel 2003 Introduction: Part II

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Microsoft® Office

Excel 2003 Intro

Part II

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Excel 2003 Introduction: Part II

7 Names

All graphics related to Microsoft in this book is in compliance with Microsoft guidelines and thus permitted by Microsoft.

By the end of this section you will be able to:

- **Create a name**
- **Use and understand Define and Create name commands**
- **Select names**
- **Use names in formulae**
- **Apply names**

7.1 Names

When entering formulae or referring to any area in a workbook, it is usual to refer to a 'range'. For example, B6 is a range reference; B6:B10 is also a range reference. One problem with this sort of reference is that it is not very meaningful and therefore easily forgettable. If you want to refer to a range several times in formulae or functions, you may find it necessary to write it down, or select it, which often means wasting time scrolling around the workbook. Instead, Excel offers the chance to name ranges in a workbook, and to use these names to select cells, refer to them in formulae or use them in Database, Chart or Macro commands.

Rules when naming cells

Names are unique within a workbook and the names that you choose to use must adhere to certain rules.

The first character of a name must be a letter or an underscore character. Remaining characters in the name can be letters, numbers, full stops, and underscore characters.
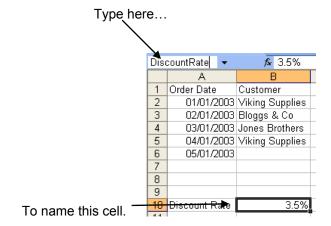
Names cannot be the same as a cell reference, such as Z$100 or R1C1.

Spaces are not allowed. Underscore characters and full stops may be used as word separators - for example, First.Quarter or Sales_Tax.
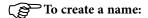
A name can contain up to 255 characters.

Names can contain uppercase and lowercase letters. Microsoft Excel does not distinguish between uppercase and lowercase characters in names. For example, if you have created the name Sales and then create another name called SALES in the same workbook, the second name will replace the first one.

Name Box

Type here…

To name this cell.

The Name box is situated on the left-hand side of the Formula bar. You can use the Name box to set up names and move to them.

☞ **To create a name:**
   Mouse
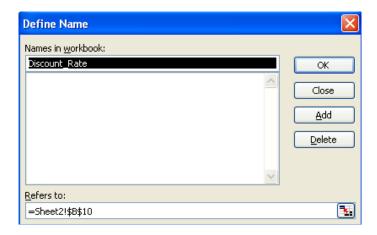
- Select the cell or cells you want to name.
- Click in the Name box and type your name.
- Press [ENTER].

Define Name

You will often find that the names you want to use for your cells are the same as the headings you have given them on your worksheet. When this is the case, you can save yourself some typing by using Define name to set them up. With the Define name command, Excel looks at the cells around those selected and if it finds a label, it proposes that you use it as your name. You can still overwrite Excel's proposal if it chooses something inappropriate.

☞ **To define a name:**
   Mouse

- Select the cell or cells you want to name.
- Choose Insert from the menu bar, click Name and then Define. The following dialog box will appear:
- The **Names in workbook** box will contain the name Excel proposes for the selection. The **Refers to** box (at the bottom of the dialog) will show the range of the selected cells.
- Click OK to accept Excel's proposed name and close the dialog.
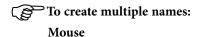
Or

- Type the name you want to use.
- Click OK to set the name up and close the dialog.

Create names

When you want to use column and row headings on a worksheet to set up names for data, you do not have to do them one by one. In the example below, it would be useful to set up names for the different month's *and* the different countries. You can create them all at once using Create names.

	A	B	C	D	E	F	G
1		Jan	Feb	Mar	Apr	May	Jun
2	Britain	£1,402.34	£1,644.20	£1,318.73	£1,068.65	£1,563.09	£1,001.12
3	France	£1,682.87	£1,007.93	£1,730.16	£1,562.04	£1,060.25	£1,150.39
4	Germany	£1,648.26	£1,375.98	£1,843.82	£1,055.18	£1,850.84	£1,717.43

☞ **To create multiple names:**

Mouse

- Select the range you want to set names up for, *including* the column and/or row headings to be used as names.
- Choose Insert from the menu bar, click Name, then Create. The following dialog box will appear:
- Excel will guess which edges of the selection contain the labels you want to use, however you can change the options by checking and unchecking the boxes until the correct edges are selected.
- Click OK to set the names up.

When you select a named range, its name appears in the Name box.

Selecting names

Once you have created names in a workbook, you can quickly move to them either using the Name box or [F5] (Go To key).

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☞ **To select a named range:**

Mouse

- Click the drop-down list arrow to the right of the Name box.
- Choose the name you want to select by clicking it with the mouse.
- The screen display will jump to the range you chose and select the cells within it.

Or

Keyboard

- Press [F5] to access the Go To dialog.
- Press [TAB] to select the first item in the **Go To** list.
- Use the arrow keys to move the highlight bar up and down the list of defined names.
- Press [ENTER] to move to the selected name.

Names in Formulae

Because names make selecting and referring to cells much easier, it makes sense to use them in formulae. The other advantage that they have over cell references is that names are *absolute*. This means that you do not have to worry about copying formulae that refer to names.

☞ **To use names in formulae:**
Keyboard

- Move to the cell where you want the formula and begin typing it – all formulae begin with an equals (=) sign.

- When you want to use the name, press [F3] to access the Paste Name dialog:

Figure 42 - *Paste Name dialog*

- Use the up and down arrow keys to highlight the name you want in your formula.
- Press [ENTER] to close the dialog and paste the name into the formula.

> *If you can remember what you called your ranges when you named them, you can simply type the name into the formula.*

Apply names

There may be occasions where you already had formulae and functions set up in a workbook *before* you created any names. This might mean that there are formulae referring to cell references that you have subsequently given names to. You can apply names to formulae even if you created them after the formulae themselves were set up.

Cells in B22:G22 called Britain

References to replace with range name Britain
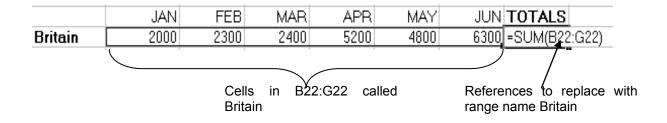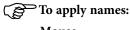
Figure 43 - Apply Names dialog

☞ **To apply names:**

Mouse
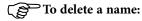
- Select the cell or cells containing the formulae whose references you want to replace with names.
- Choose Insert from the menu bar, click Name and then Apply. The following dialog box will appear:

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- Excel will pick those names it thinks relevant to your selection, however, you can select or deselect other names in the list by clicking on them.
- When all names to be applied have been selected, click OK to apply the names and close the dialog. When you look at your formulae, you should find that anywhere there were references to named ranges, Excel has replaced the cell references with the names.

Delete names

You can delete names from your workbook if you are no longer using them.

☞ **To delete a name:**

Mouse

- Choose Insert from the menu bar, click Name then Define. The Define Name dialog will appear. Any names in the currently opened files appear listed.
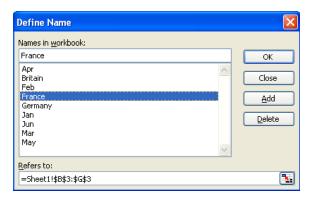
Figure 44 - *Deleting a name*

- Click the name you want to delete.
- Click the Delete button.
- Click the OK button to close the dialog.

> *If you delete a name that is being used in formulae, Excel will display #NAME? in the cell containing those formulae.*

☺ **Useful Information**

Paste List

You can use the Paste Names dialog to give you an index of all the names in your workbook. Excel will place this on the workbook wherever the active cell is positioned.

☞ **To paste a list of names:**
   Keyboard
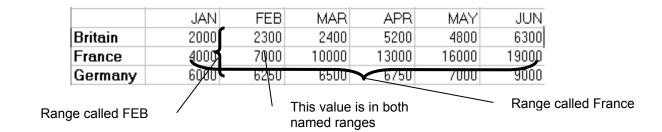
- Select a blank cell where you want the list of names to begin.
- Press [F3] to access the Paste Names dialog.
- Press [TAB] to jump to the Cancel button, then [TAB] again to select the Paste List button.
- The list will appear on the worksheet.

> *When you choose a start cell for your pasted list, make sure there is not any data immediately below as it will get cleared when you paste the list.*

Intersecting names

Where you have named both columns of cells *and* rows of cells in a table, all the values will belong to two ranges. You can use both names in a formula to retrieve the value where they intersect.

☞ **To display a value from intersecting range names:**
   Keyboard

- Select the cell where you want to display the value.

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- Type an equals sign (=) to begin the formula then press [F3] to access the Paste Names dialog, select the first name and press [ENTER].
- Type a space. Press [F3] again and select the second name. Press [ENTER].
- Press [ENTER] to complete the formula.

> *For example: To retrieve the France's February figure from the data shown in the diagram above, your formula would read:*
>
> *=France FEB*

•**Notes**

8   Working with multiple sheets

By the end of this section you will be able to:

- **Rename worksheets**
- **Insert and delete worksheets**
- **Move and copy worksheets**
- **Enter data on several worksheets simultaneously**
- **Fill data across worksheets**
- **Create 3-D formulae**
- **Protect worksheet data**
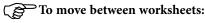
8.1   Multiple worksheets

When you create a new workbook, Excel gives you multiple pages within that workbook called *worksheets*. The number of worksheets you get defaults to 16, but you can change that (see the section on customisation for more information). The worksheets are useful when you want to store information under common column headings but need to split it up, (for example by month, week or by department).

When the same data needs to be entered on several worksheets, you can use Group mode which forces data that you type on one worksheet appear on all selected sheets. When Group mode is active, any formatting that you apply to the active worksheet also gets applied to the selected sheets.
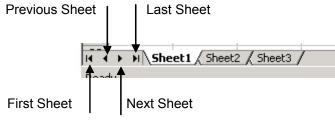
Moving between the Workbook sheets

Each new workbook contains worksheets, named sheets 1 to sheet 3. The sheet name appears on a tab at the bottom of the workbook window.

☞ **To move between worksheets:**

   Mouse

- Click on the appropriate tab

Previous Sheet   Last Sheet

First Sheet   Next Sheet

> *If the sheet required is not in view, use the tab scrolling buttons to display the sheet.*

Or

Keyboard

- Press [CTRL][PAGE DOWN] to move to the next sheet, or [CTRL][PAGE UP] to move to the previous sheet.

Worksheet names
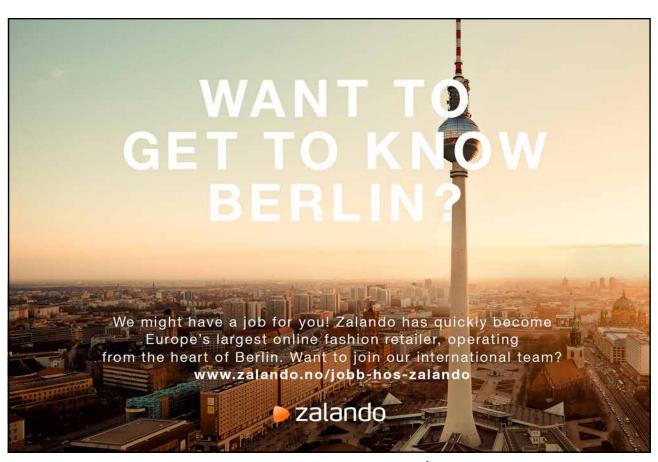
Excel assigns the names "Sheet 1, Sheet 2" and so on to worksheets in a workbook but you can overwrite them with more meaningful names to describe the data they contain.

☞ **To rename a worksheet:**

Mouse
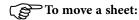
- Double-click the sheet tab that you want to rename – the current name will become highlighted.
- Type the name you want.
- Press [ENTER].

Worksheet names can be a maximum of 31 characters.

Move and copy worksheets

Having named your sheets, you may need to switch them about so they are arranged in a different order.

☞ **To move a sheet:**

Mouse

- Click and drag the sheet tab left or right. You'll see a page which follows your mouse pointer as you drag and a black marker arrow to show where the sheet will jump to if you release the mouse.
- Release the mouse when the sheet is in the correct position.

☞ **To copy a worksheet:**

Mouse

- Hold down the [CTRL] key then click and drag the sheet tab.
- When the black arrow marker indicates the position that you want the copy, release the mouse *then* the [CTRL] key.

Because no 2 worksheets can have the same name, when you copy a sheet as described above, Excel will suffix the copy's name with (2).
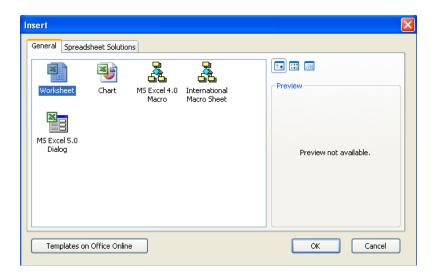
Insert and delete worksheets

You can add and remove worksheets to and from a workbook as required.

☞ **To add a worksheet:**

Mouse

- Click the right mouse button over the sheet tab immediately after where you want the new one.
- Choose Insert from the shortcut menu. The following dialog box will appear:

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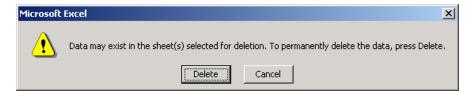
- Double-click the Worksheet icon. Your new worksheet will appear. Excel will name it initially with the next sequential number available.

☞ **To delete a worksheet:**

Mouse

- Click the right mouse button over the worksheet that you want to delete.

- Choose Delete from the shortcut menu. The following dialog box will appear:
- Click OK to confirm the deletion.

8.2   Activate group mode

Whenever you select more than one worksheet, Excel considers those sheets to be grouped and switches group mode on accordingly. When group mode is active, the grouped worksheet tabs turn white and the word "[group]" appears on the title bar. Any data that you enter and any formatting that you apply will appear on all worksheets in the group in the same positions on each – this is particularly useful if you need to create a "Summary" sheet that will reference the other worksheets three dimensionally.

Group adjacent sheets

When the worksheets that you want to group are next to each other, you can use the [SHIFT] key to block select them.

☞ **To group adjacent worksheets:**
Mouse

- Click the on the first worksheet's tab that you want to include in your group.
- Hold down the [SHIFT] key and click on the last worksheet's tab that you want included in your group. All the sheets between the first and the last will be selected. The selected sheet tabs will turn white and the word "[group]" will appear on the title bar.

Group non-adjacent sheets

When the sheets you want are not next to each other in the workbook, you can use the [CTRL] key to group them.

☞ **To group non-adjacent worksheets:**
Mouse

- Click the on the first worksheet's tab that you want to include in your group.
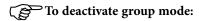
- Hold down the [CTRL] key and click each other worksheet's tab that you want included in your group. The selected sheet tabs will turn white and the word "[group]" will appear on the title bar.

When worksheets are grouped, use normal data entry and formatting commands to populate them (see previous sections for more information).

Deactivate group mode

When you have finished entering and formatting data simultaneously, you can deactivate group mode. There are two ways to do this:

👉 **To deactivate group mode:**
   Mouse
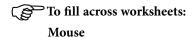
- Click on a sheet tab that is not currently grouped (non white).
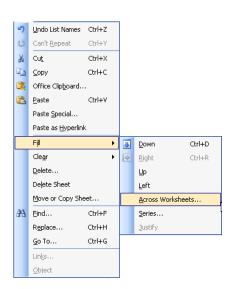
Or

- Click the right mouse button over any sheet tab and choose Ungroup Sheets from the shortcut menu.

Fill data across worksheets

You can copy data to the same position on multiple sheets using the Fill command. This is particularly useful if you need to decide what gets copied (everything, or just the formats). It also saves time for those occasions where you accidentally deactivated group mode, typed your entries and then realised that they are only on one page!

👉 **To fill across worksheets:**
   Mouse

- Select the cells you want to copy to the other worksheet(s).
- Select the worksheets you want the copy to appear on by clicking the sheet tabs (use [SHIFT] to block select or [CTRL] to pick non-adjacent pages).
- Choose Edit from the menu bar, click Fill then Across Worksheets. The following dialog will appear:
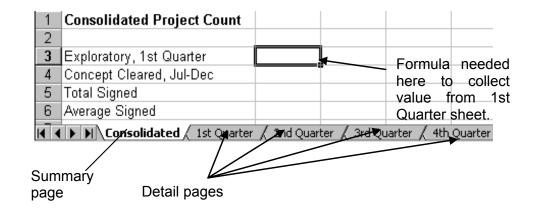
- Choose the appropriate option and click OK.

When you have finished filling the data, remember to deactivate group mode!

3-D formulae

When you have data on multiple worksheets, you often want a summary page that will collect data from cells across all the sheets and calculate it in a certain way. You can do this with a 3-D formula. 3-D formulae are no different from the formulae already discussed in an earlier section of this manual, however, the way you refer to cells on different worksheets has not yet been explored – that is what we will look at in this section.

External references

When you refer to a cell that is in another worksheet, Excel uses the following syntax:

Single cell

'Worksheet name'![Cell reference]

In the diagram above, cell B3 on the 1st Quarter sheet would be referenced as follows:

'1st Quarter'!B3

Cells on adjacent worksheets

'1stWorksheet name:lastWorksheet name'![Cell reference]

In the diagram above, cell B3 across all Quarters would be referenced:

'1st Quarter:4th Quarter'!B3
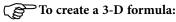
Cells on non-adjacent worksheets

'1st Worksheet name'![Cell reference],'2nd Worksheet name'![Cell reference]

In the diagram overleaf, cell B3 on 1st Quarter and 4th Quarter would be referenced:

'1st Quarter'!B3, '2nd Quarter'!B3

Luckily, because you can get Excel to put the references in automatically by pointing at the cells, you do not have to memorise the syntax!

☞ **To create a 3-D formula:**
   Mouse

- Select the cell where you want the result.
- Begin the formula by typing an equals sign (=), or select a function that you want to use.
- When you need to enter cell references in your formula, move to the worksheet that contains the first cell you want by clicking the relevant sheet tab.
- Click on the cell whose value you want in your formula.
- If you only need to refer to one cell, press [ENTER] to complete the formula.

   Or

- If you need to select the same cell on adjacent sheets, hold down the [SHIFT] key and click on the last sheet tab in the block of adjacent sheets. Press [ENTER] to complete the formula.

   Or
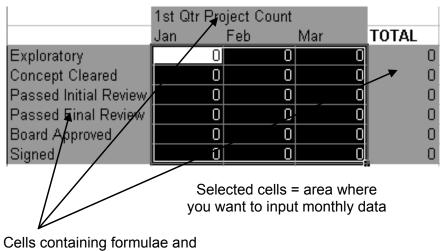
- If you need to select the different cells on different sheets, type a comma and click the next sheet tab and cell you need to reference, insert another comma and click the next sheet tab and cell you need to reference and so on until all references have been entered. Press [ENTER] to complete the formula.

Protect worksheet data

If you type in a cell that already has an entry, you overwrite that entry as soon as you press [ENTER]. Excel does have an Undo facility, but if you need to delegate data entry to someone who is not too familiar with Excel, they could quite feasibly end up overwriting your carefully constructed formulae. To prevent that happening, you can protect worksheets in workbooks.

Protected sheets can allow access to some cells but not others. Those that are unavailable cannot be edited, formatted or cleared.

Unlock cells

Selected cells = area where
you want to input monthly data
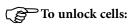
Cells containing formulae and
headings that you want to
protect

By default, all cells in a worksheet are locked. This does not have any effect on data entry and editing until you switch on the worksheet protection at which point all locked cells are made unavailable. This means that if you want to have access to certain cells, but not others, you need to unlock those cells first.

In the diagram above, you would need to unlock the selected cells so that when you protect the worksheet, those cells are accessible.

☞ **To unlock cells:**

Mouse

- Select the cells you want to be accessible when you protect the worksheet – you can select cells on multiple sheets using group mode if necessary.
- Choose Format from the menu bar and click Cells.
- Click the **Protection** tab.
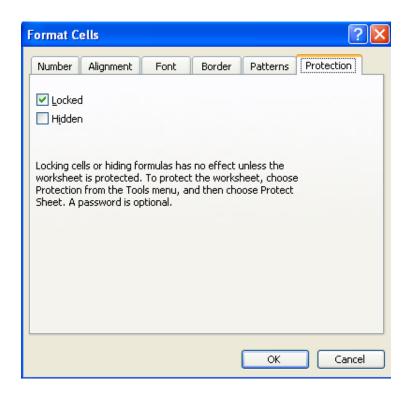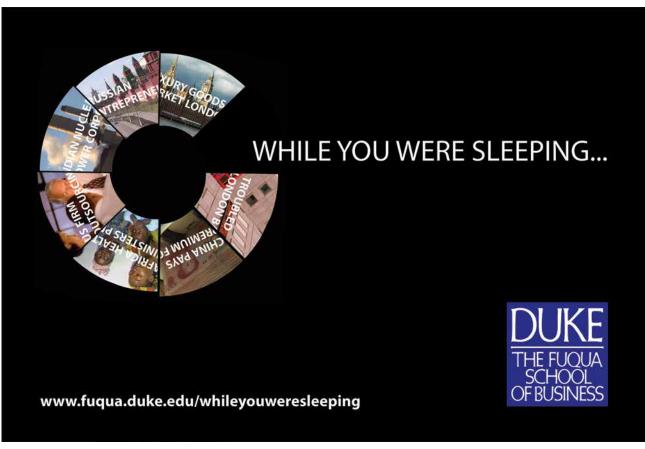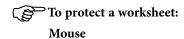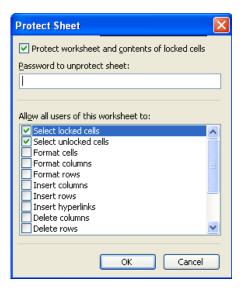
Figure 45 - *Format cells dialog (Protection tab)*
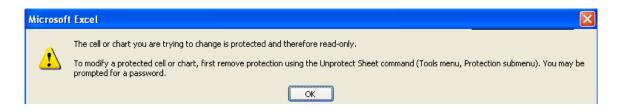
- Uncheck the **Locked** box.
- Click OK to close the dialog and save the setting.

☞ **To protect a worksheet:**
Mouse

- Ensure that the sheet you want to protect is the active sheet.
- Choose Tools from the menu bar, click Protection then Protect Sheet. The following dialog box will appear:
- Type a password to prevent unauthorized users from removing sheet protection. A password is case sensitive, can be up to 255 characters long, and can contain any combination of letters, numbers, and symbols.
- Click OK to close the dialog and switch on sheet protection.

With worksheet protection active, only the unlocked cells are available for data entry, editing, formatting and deleting. If you try and type in a locked cell, the following warning appears:

Unprotect sheets

If you do need access to the locked cells, you can switch worksheet protection off, provided you know the correct password.

☞ **To switch off sheet protection:**
   Mouse

- Select the protected sheet.

- Choose Tools from the menu bar, click Protection and then Unprotect Sheet. You will be prompted for the password:
- Type the password and click OK. The sheet is now unprotected.

> *Excel only lets you protect and unprotect sheets one at a time, that is you cannot group all the sheets you want to protect or unprotect and do it in one go.*
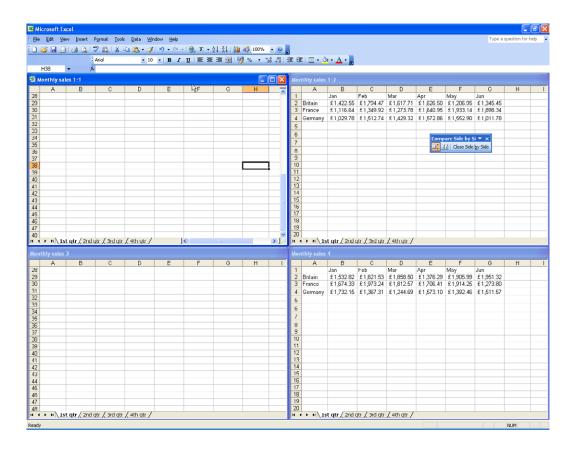
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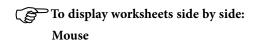
☺   **Useful Information**

View worksheets side by side

You can display several worksheets in a workbook tiled on screen.

In the diagram above the workbook "Exquart.xls" consists of four worksheets, "1st Quarter, 2nd Quarter" and so on. They have been arranged each in their own window and tiled.

👉**To display worksheets side by side:**

   Mouse

- Choose Window from the menu bar and click New Window.

- Repeat the above step until you have a window for each worksheet.
- Choose Window, Arrange. The Arrange Windows dialog box will appear:
- Choose the arrangement you want your worksheet windows to follow. Check the box **Windows of active workbook** (this prevents windows from other open files being included in the arrangement).
- Click OK to close the dialog and arrange the windows.

> *If your initial window is maximised, you do not see any change to the screen when you issue the New Window command, you may not know how many windows you have. When you access the Window menu, the bottom section lists the number of windows currently open.*

☞ **To cancel window arrangement:**

Mouse

- Close each window until there is only one left, by double-clicking the workbook icon in the top left-hand corner.
- Maximise the window by double-clicking its title bar.

Watch Window

A watch window can be used to easily track results of multiple cells when you are working on a different sheet or workbook. This prevents you from having to switch back and forth or scroll between sheets to keep track of important data.

- Select a cell to which you want to add a Watch
- Right click that cell and select Add Watch

Figure 46 - *Watch Window*

Change Colour of Worksheet Tab

👉 **To change the colour of a worksheet tab:**

- Select the worksheet whose tab you want to re-colour.
- In the Format menu, choose Sheet then Tab Colour.
- Select the colour and click OK

Or

- Right-click on the tab and choose the Tab Colour option.
- Select the colour and click OK

More Protecting of Data

The Protect Sheet dialog box (in Tools, Protection) also offers other checkboxes which can be used to allow users to change certain features within the spreadsheet while still not being allowed to change cell contents (therefore still keeping your formulae safe).

Example:

Ticking the Format Cells option would then allow all users to change the formatting of cells (locked or unlocked) while still preventing them from changing the actual contents of the locked cells.

•Notes

9   Printing

By the end of this section you will be able to:

- **Preview your printout**
- **Change Page orientation**
- **Scale the size of the printout**
- **Centre the printout on the page**
- **Add headers and footers**
- **Change worksheet print settings**
- **Add page breaks, set print areas and print titles**
- **Print data**

9.1   Printing

When you want a hard copy of worksheet data, Excel gives you many tools for choosing how that printout will look. Swapping the page orientation between portrait and landscape, scaling the size of the printout and choosing whether to print worksheet gridlines are but a few of the options that can be set. Excel automatically assigns headers and footers to your worksheet data, but you can change or enhance these very easily.

Print Preview

Before sending anything to print, it is always a good idea to preview what you will see on the page. The Print Preview window will show how your data is going to print.
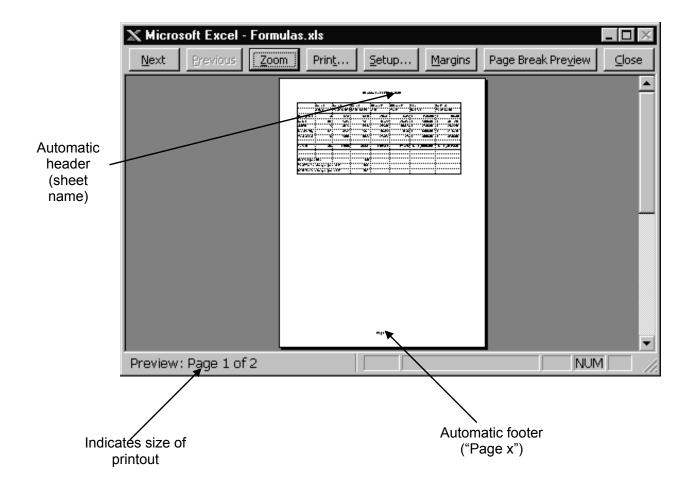
Figure 47 - Print Preview screen

☞ **To print preview a worksheet:**

Mouse

- 🔍 Click the Print Preview button from the standard toolbar. The Print Preview window will appear (*see previous page*).
- The mouse pointer displays as a magnifying glass when over the previewed page – click once over a page area to zoom in. A second click will zoom you out.
- If the printout runs to several pages, the status bar will tell you. Use [PAGE UP] and [PAGE DOWN] to move to the next and previous page.
- Click the button marked Close from the Print Preview toolbar to close the preview and return to the worksheet.

Page Setup

When you want to alter headers and footers, orientation and so on, you use the Page Setup dialog box. There are four tabs within this dialog, each give settings for one aspect of your printout. You can access the Page Setup dialog from either the worksheet or the Print Preview window, however if you access it from the latter, some of the **Sheet** tab settings are unavailable.

☞ **To access the page setup dialog:**
   Mouse

- Choose File from the menu bar, then Page Setup.

   Or

- If you are in the Print Preview window, click the Page Setup button

Page tab

The **Page** tab allows you to set page orientation, scaling, paper size, print quality and a start number for page numbering.
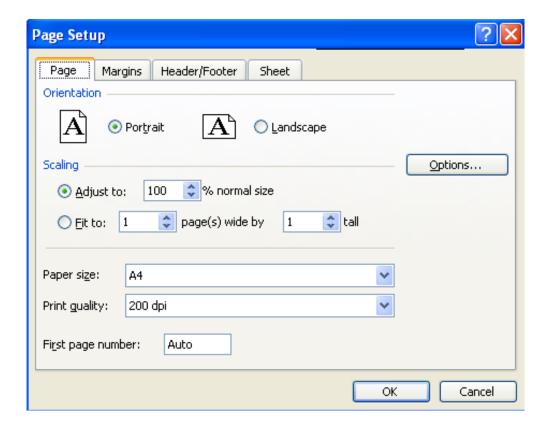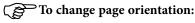
Figure 48 - *Page setup dialog (page tab)*
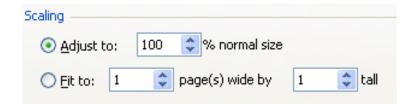
Orientation

Use this setting to swap between portrait and landscape printouts.

☞ **To change page orientation:**
   Mouse

- Access the Page Setup dialog and click the **Page** tab.
- The default orientation is **Portrait**. Click **Landscape** to switch to printing on a landscape page.
- Click OK to close the dialog and save the setting – next time you access Print Preview, the new settings will be displayed.

Scaling

You can manually scale the size of your printout by choosing a percentage amount you want to increase or decrease it by. The Adjust to option reduces or enlarges the printed worksheet. The Fit to option will only reduce (not enlarge) the worksheet or selection when you print so that it fits on the specified number of pages.

☞ **To reduce or enlarge your printout:**
      Mouse

- Access the Page Setup dialog and click the **Page** tab.
- Select the **Adjust to** check box, and then enter a percentage number in the % normal size box. You can reduce the worksheet to 10 percent of normal size or enlarge it to 400 percent of normal size.
- Click OK to close the dialog and save the setting – next time you access Print Preview, the new settings will be displayed.
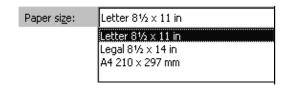
☞ **To fit your printout to a number of pages:**
      Mouse
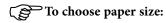
- Access the Page Setup dialog and click the **Page** tab.
- Select the **Fit to** check box and then enter a number in the **page(s) wide by** box. If you want to limit the number of pages tall, enter a number in the **tall** box.
- Click OK to close the dialog and save the setting – next time you access Print Preview, the new settings will be displayed.

Paper size

You can pick the size of the paper you want to print on by choosing from a list of pre-defined sizes.
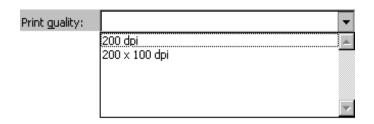
Paper size:	Letter 8½ x 11 in
	Letter 8½ x 11 in
	Legal 8½ x 14 in
	A4 210 x 297 mm

☞ **To choose paper size:**

   Mouse

- Access the Page Setup dialog and click the **Page** tab.
- Click the drop-down list arrow to the right of the **Paper Size** box and click the paper size you want.
- Click OK to close the dialog and save the setting – next time you access Print Preview, the new settings will be displayed.

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Print quality

You can enhance the quality of the printout if you need a pristine copy.

☞ **To change print quality:**
   Mouse
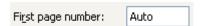
- Access the Page Setup dialog and click the **Page** tab.
- Click the drop-down list arrow to the right of the **Print Quality** box and click the resolution you want for the print quality of the active workbook.
- Click OK to close the dialog and save the setting – next time you access Print Preview, the new settings will be displayed.

   Resolution is the number of dots per linear inch (dpi) that appear on the printed page. Higher resolution produces better quality printing in printers that support higher resolution printing.

Set first page number

If your printout is to form part of a larger document, you may need to change start number for pages.

☞ **To change first page number:**
   Mouse

- Access the Page Setup dialog and click the **Page** tab.
- Drag across the word Auto in the **First page number** box to select it. Type the number you want the page numbering to begin at.
- Click OK to close the dialog and save the setting – next time you access Print Preview, the new settings will be displayed.

Margins tab

The Margins tab lets you set top, bottom, left and right margins and centre your data horizontally and vertically on the page. You can also determine how far from the bottom and top edges of the page your headers and footers print.

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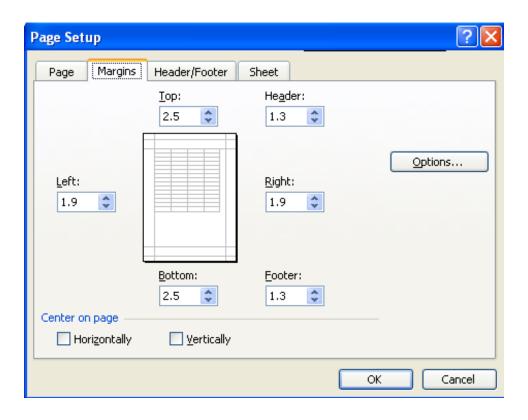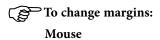
Figure 49 - *Page Setup dialog (Margins tab)*

☞ **To change margins:**

Mouse

- Access the Page Setup dialog and click the **Margins** tab.

- Use the up and down arrows in the **Top**, **Bottom**, **Left** and **Right** boxes to increase and decrease margin measurements. The page sample in the middle of the dialog will update to show how your settings will look should you choose to apply them.

- Click OK to close the dialog and save the settings – next time you access Print Preview, the new settings will be displayed.

☞ **To change header and footer position:**
Mouse

- Access the Page Setup dialog and click the **Margins** tab.
- Use the up and down arrows in the **Header** and **Footer** boxes to increase and decrease the space between the header and footer and the top and bottom edges of the page.
- Click OK to close the dialog and save the settings – next time you access Print Preview, the new settings will be displayed.

Centre on page

Use these check boxes to centre the data you are printing horizontally (between left and right margins) and/or vertically (between top and bottom margins).

☞ **To centre horizontally and vertically:**
Mouse

- Access the Page Setup dialog and click the **Margins** tab.
- Click the **Horizontally** check box to centre between left and right margins. Click the **Vertically** check box to centre between top and bottom margins.

- Click OK to close the dialog and save the settings – next time you access Print Preview, the new settings will be displayed.

Header/Footer tab

Unless you specify otherwise, Excel uses the sheet name as the header for your printout and the page number as the footer. You can choose from a predefined list of options for your header and footer, or for total flexibility, you can build up the header and footer with codes that will generate dates, times, file names etc.
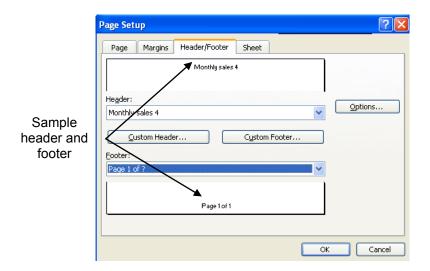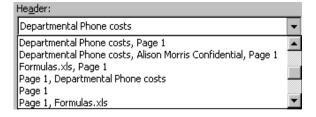
Figure 50 - Page Setup dialog (Header/Footer tab)

Header

Excel's default header is the sheet name. The **Header** box gives a list of options for you to use as your header. Excel spaces items out in the header at the top left, middle and top right of the page. Where an option has commas separating items Excel will interpret the comma as the spacing symbol.
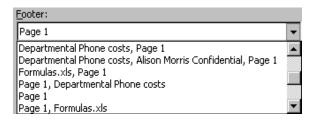
👉 **To change the header:**
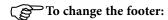
Mouse

- Access the Page Setup dialog and click the **Header/Footer** tab.
- Click the drop-down list arrow to the right of the **Header** box to view a list of predefined headers and click the one you want. The sample area will show you what your choice will look like.
- Click OK to close the dialog and save the settings – next time you access Print Preview, the new settings will be displayed.

Footer

Excel's default footer is the page number. The **Footer** box, gives you the same options as the header box, but the position of the chosen item will be at the bottom of the page. Excel spaces items out in the footer at the top left, middle and top right of the page. Where an option has commas separating items Excel will interpret the comma as the spacing symbol.

👉 **To change the footer:**

Mouse

- Access the Page Setup dialog and click the **Header/Footer** tab.
- Click the drop-down list arrow to the right of the **Footer** box to view a list of predefined footers and click the one you want.
- Click OK to close the dialog and save the settings – next time you access Print Preview, the new settings will be displayed.

Custom Header and Footer

If none of the predefined headers and footers are what you want, you can customise them using the Custom Header and Custom Footer buttons. When you click either of these buttons, Excel gives you a dialog box representing either the top (Custom Header) or bottom (Custom Footer) edge of your page.

You can type text into the left, centre and right sections, but if you want information to change dynamically according to alterations you make to filenames, sheet names or you want to always display the current date and time in the header (useful for seeing when a worksheet was printed),the dialog has buttons that generate codes. The codes instruct Excel to include information where you have positioned them and will update if the information that they generate changes. The diagram below details what each of the buttons does.

Format Picture

Insert Picture

Inserts the name of the active worksheet sheet

Format header text

Insert page number

Insert total number of pages

Insert current date

Insert current time

Insert current filename

Insert sheet name
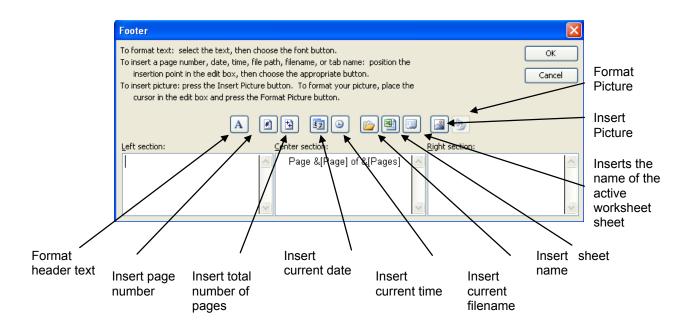
Figure 51 - *Custom Header/Footer buttons*

☞ **To customise a header or footer:**

    Mouse

- Access the Page Setup dialog and click the **Header/Footer** tab.
- Click the Custom Header or Custom Footer button depending on which you want to customise.
- Type any text that you want in each section and use the buttons to include dates, times, filenames and so on.
- 🅰 Use the Format button to change the header text attributes by selecting the data in the section and then clicking the button.
- Click OK to close the dialog and save the settings – next time you access Print Preview, the new settings will be displayed.

Sheet tab

The Sheet tab has many settings that you can use to select what appears on the printed sheet. You can also use this tab to set a print area, (useful if you do not want the whole worksheet to print) and print titles.

Some settings on the Sheet tab are only available when you access the Page Setup dialog from the File menu. If you are accessing it from the Print Preview window, you will not have access to the Print Area and Print Titles settings.
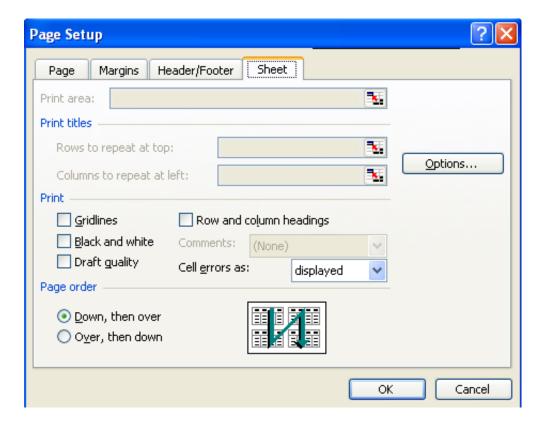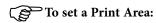
Figure 52 - Page Setup dialog (Sheet tab)
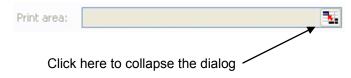
Print Area

Use this to set the range of cells that you want to print. If you do not set a Print Area, Excel will print all the data on the active worksheet.
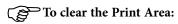
☞ **To set a Print Area:**

Mouse

- Access the Page Setup dialog and click the **Sheet** tab.
- Click the button on the right of the Print Area box to collapse the Page Setup dialog so that you can see the worksheet(see below):
- Select the cells you want to print and click the Expand button to go back to the Page Setup dialog (see below):

Print area: ▢

Click here to collapse the dialog

Page Setup - Print area: [?][X]

                                                          Expand button

- The selected cells will appear listed in the Print Area dialog. Click OK to close the dialog and save the settings – next time you access Print Preview, the new settings will be displayed.

☞ **To clear the Print Area:**

Mouse

- Choose File from the menu bar, click Print Area, then Clear Print Area.

    You can use the Set Print Area option to set the selected cells to the print area as an alternative to using the Page Setup dialog.

Print Titles

When your printouts run to several pages you may have column and row headings that you would like to print on each new page. The diagram below shows a four page printout where the months have been set up to print at the top of each page and the years at the left of each page. Excel allows you to specify any number of rows and columns to repeat when you have a multi-page printout.

Figure 53 - *Print titles*

☞ **To set print titles:**

Mouse

- Access the Page Setup dialog and click the **Sheet** tab.
- Click the button on the right of the **Rows to repeat at top** box to collapse the Page Setup dialog so that you can see the worksheet (see the diagrams on the previous page). Select the rows you want by dragging over them with the selection pointer.
- Click the Expand button to return to the Page Setup dialog. The rows you selected will be referenced in the **Rows to repeat at top** box.
- Repeat steps 2 (selecting columns not rows) and 3 above for the **Columns to repeat at left** box if required.
- Click OK to close the dialog and save the settings – next time you access Print Preview, the new settings will be displayed.

Print

The settings here allow you to choose whether to print gridlines, row and column headings and so on. If you choose not to print gridlines, Excel will print any borders you formatted your cells with. The diagrams below illustrate some of the effects of activating certain settings.

Worksheet with row and column headings.

☞ **To change Sheet tab Print settings:**

Mouse

- Access the Page Setup dialog and click the Sheet tab.
- Check the boxes under the **Print** heading until you have the combination of settings that you require.
- Click OK to close the dialog and save the settings – next time you access Print Preview, the new settings will be displayed.

Page Order

When you have multiple pages to print, each with a printed page number, you can control the order that the data prints on the pages using the Page Order settings.
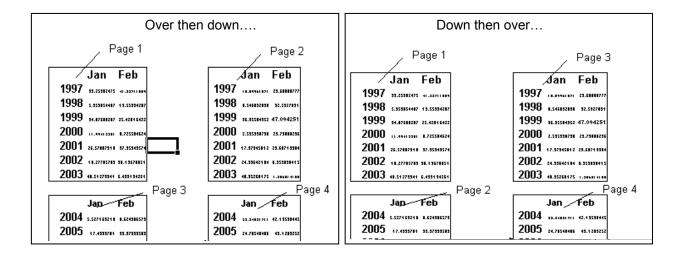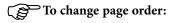
Figure 54 - *Page order*

The diagram above shows how pages will have different numbers according to which setting you choose.

☞ **To change page order:**
Mouse

- Access the Page Setup dialog and click the **Sheet** tab.
- Click the option button in the **Page Order** section for the order you want the pages numbered.
- Click OK to close the dialog and save the settings – next time you access Print Preview, the new settings will be displayed.

> *The Page Setup dialog saves print settings for the active sheet only. If you want several sheets to have the same print settings, select them before you access the Page Setup dialog.*

Page breaks

If you do not get page breaks to fall where you want them with the scaling options, you can insert them manually. Excel lets you put in both horizontal and vertical page breaks.

☞ **To insert a horizontal page break:**
Mouse

- Select the cell in column A below where you want the page break.
- Choose Insert from the menu bar then click Page Break. A dotted line will appear above the active cell – this represents the page break.

☞ **To insert a vertical page break:**
Mouse

- Select the cell in row 1 to the right of where you want the page break.
- Choose Insert from the menu bar then click Page Break. A dotted line will appear to the left of the active cell – this represents the page break.

> *If you insert a page break when you are not in either the first column or row, Excel will insert both a horizontal and vertical page break above and to the left of the active cell position.*

☞ **To remove a page break:**
Mouse

- Select the cell immediately below and/or to the right of the page break.

- Choose Insert from the menu bar and click Remove page break.

If the Fit To option is active in the page setup dialog, you cannot set manual page breaks.

Print data

Excel will print all data on the selected worksheet (unless you tell it otherwise by setting a Print Area). If you want to print more than one worksheet, select the sheets you want first, before you click the Print button.

☞ **To print the active worksheets:**

Mouse

- Click the print button from the standard toolbar

Or

Keyboard

- Press [CTRL][P]. The Print dialog will appear; press [ENTER] to confirm the settings and launch the print. Excel will display a dialog telling you what is printing.

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☞ **To print a specific worksheet page or range of pages:**
Mouse

- Choose File from the menu bar and then Print.

Or

Keyboard

- Press [CTRL][P].
- The following dialog box will appear:
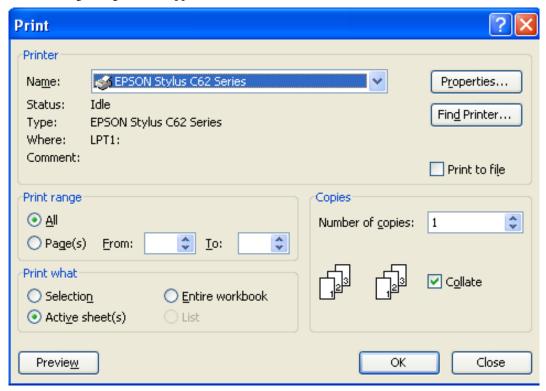
Figure 55 - *Print dialog*

- In the **Print Range** section of the dialog, click the **Pages** option button. A cursor will appear in the **From** box to the right.
- Type in the page number that you want to start at in the **From** box and the end page number in the **To** box.
- Click the OK button to launch the print.
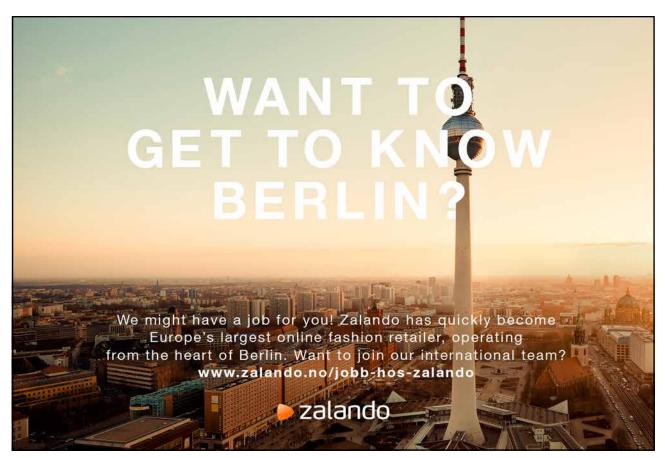
☞ **To print the entire workbook:**
Mouse

- Choose File, Print to access the Print dialog.

Or

Keyboard

- Press [CTRL][P].
- Click the **Entire workbook** option button in the **Print what** section of the dialog.
- Click OK to launch the print.

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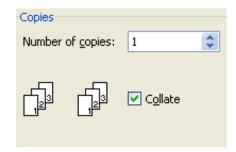
☞ **To print the selection:**

    Mouse
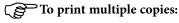
- Select the cells you want to print.
- Choose File, Print to access the Print dialog.
- Click the **Selection** option button in the **Print What** section of the dialog.
- Click OK to launch the print.

Copies

By default, Excel will print one copy of the item you have sent to print. You can print multiple copies by changing the Print dialog settings. When you print multiple copies of a document, Excel lets you choose whether the copies are collated (Excel prints each whole document before it starts on the next copy) or uncollated (Excel prints however many copies you have requested of each page).

☞ **To print multiple copies:**

    Mouse

- Choose File, Print to access the Print dialog.
- In the **Copies** section of the dialog, use the up and down arrows to the right of the **Number of copies** text box to set the number of copies you require.
- Set the **Collate** check box by clicking in it to change the current setting.
- Click OK to launch the print.

☺   **Useful Information**

Printing large spreadsheets

There are different approaches to printing information from a worksheet, depending on the end result that you want. Below are 2 different methods you can use:

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Method 1

👉 **To manually set page breaks and scaling**

Mouse

-    Click the Print Preview button from the Standard toolbar.
- In the Print Preview window, click the Setup button and ensure that the **Fit to** option on the **Page** tab is not selected. Click OK to close the dialog.
- Click the Page Break Preview button from the Print Preview window.
- Drag the page breaks (represented as dotted blue lines) to position them where you want pages to begin and end.
- Insert new page breaks if required using the short cut menu (see the section on Page Breaks earlier in this section for more information).

    Dragging the blue lines around the extremities of the displayed data will set the print area.

- Click the Print Preview button to return to the Print Preview window.
- Click the Setup button from the Print Preview window to access the Page Setup dialog. Use the **Adjust to** option to experiment with the scale the percentage at which you want your data to print (click OK to update the preview).
- When you are happy with the result, click the Print button at the top of the Preview window to print the data.
- To keep the print settings for the worksheet, save the file.

Method 2

👉 **To fit data to a specified number of pages**
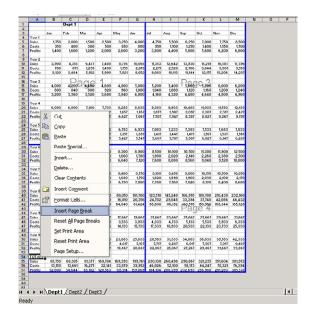
Mouse

-    Do not insert manual page breaks into your spreadsheet.
- Click the Print Preview button from the Standard toolbar.
- Click the Setup button from the Print Preview window.
- Click the **Fit to** option and then type the number of pages wide and tall you would like your data to print on. Click OK to preview the results.

    If you do not want to be specific about one of the dimensions (e.g. you want your data to fit to one A4 page wide but you do not care how many pages long it is) leave the box for that dimension blank.

- If you want to adjust where the page breaks fall, click Page Break Preview from the Print Preview window.
- Drag the page breaks (represented as dotted blue lines) to position them where you want pages to begin and end.
- Insert new page breaks if required using the short cut menu (see the section on Page Breaks earlier in this section for more information).

Dragging the blue lines around the extremities of the displayed data will set the print area.

-   Click the Print Preview button to return to the Print Preview window.
- Click the Print button when you are happy with the results.
-   To save the settings with the worksheet, click the Save button from the Standard toolbar.

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•Notes

10 Manipulating large worksheets

By the end of this section you will be able to:

- **Split the screen horizontally**
- **Split the screen vertically**
- **Freeze panes**
- **Use Zoom to scale worksheet display**

10.1   Split screen

The visible worksheet area is relatively small. If the data you are working with spans a large number of columns and rows, you may find it difficult to move and copy information between areas, or even to view data in non-adjacent columns or rows on the same screen. Splitting the screen gives you the ability to scroll the data one side of the split independently of the other side – so you could be viewing cells Z100 – AH116 on one side of your screen, and cells A1 – G16 on the other.
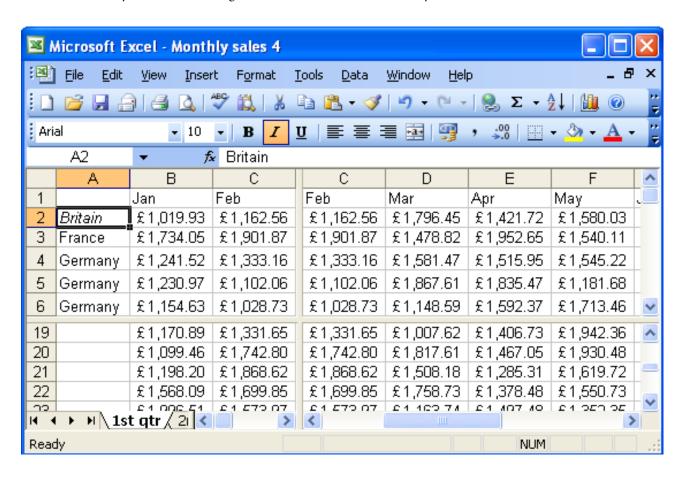
Figure 56 - *Split Screen*

☞ **To split the screen horizontally:**

Mouse
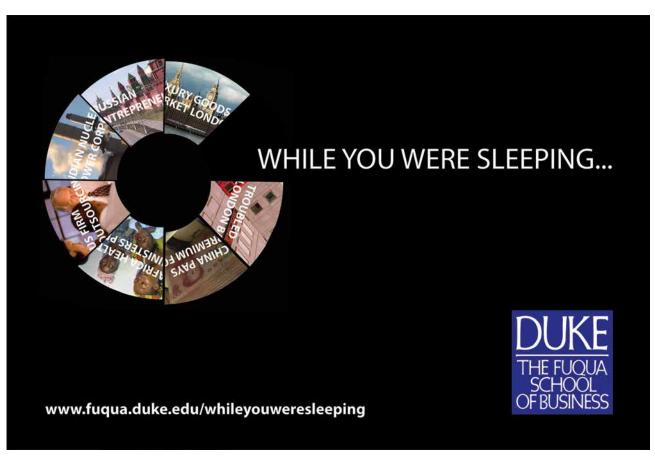
- Position the mouse along the top edge of the upward pointing arrow at the top of the vertical scroll bar – your pointer should display as shown in the diagram above.
- Drag down – you will see a fuzzy line that follows your mouse down. Release the mouse when the line is at the position you want to split the screen.

☞ **To split the screen vertically:**

Mouse

- Position the mouse along the top edge of the upward pointing arrow at the right of the horizontal scroll bar – your pointer should display as shown in the diagram on the previous page.
- Drag left – you will see a fuzzy line that follows your mouse across. Release the mouse when the line is at the position you want to split the screen.

When the screen is split, you get scroll bars in each horizontal or vertical section of your window which you can use to move the display for just that section.

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☞ **To remove a split:**
   Mouse

- Position the mouse over the split.
- Drag a horizontal split back up until it is flush with the column letters and release the mouse.

   Or

- Drag a vertical split right until it is flush with the vertical scroll bar.

Freeze panes

- When you want certain rows or columns to remain static on screen while you scroll down or across data on a worksheet, you can use freeze panes.

Freeze
Lines
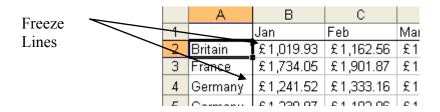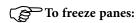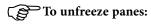
Figure 58 - *Frozen panes*

☞ **To freeze panes:**
   Mouse

- Select the cell below and to the right of the cells you want to freeze.
- Choose Window from the menu bar then click, Freeze panes. You will see solid lines appear below and to the right of the frozen rows and columns.

   If you only want the freeze for rows, select the cell in column A below the rows you want to freeze. If you only want the freeze for columns, select the cell in row 1 to the right of the columns you want to freeze.

☞ **To unfreeze panes:**
   Mouse

- Choose Window from the menu bar then click Unfreeze panes.

Zoom

You can adjust the scale of the on-screen display with the Zoom command. Excel allows you to specify any percentage between 1 and 100 for viewing on-screen data. If there is a particular range that you need to make visible on one screen without scrolling, you can use the Fit selection option.

☞ **To zoom screen display:**
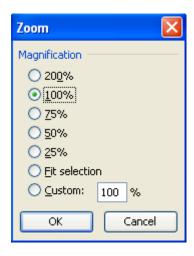
Figure 59 - *Zoom dialog*

Mouse

- Choose View from the menu bar, then click Zoom. The following dialog box will appear:
- Select the percentage you want to scale the view by clicking one of the option buttons.

Or

- Drag across the percentage figure currently displaying in the Custom Zoom text box and type the figure you want to use.
- Click OK to apply the zoom and close the dialog.

☺ **Useful Information**

If you need a block of cells to fit in to one screen, select them, then choose View from the menu bar and click Zoom to access the zoom dialog. Choose the Fit Selection option and click OK. Your screen will be scaled so that the selected cells are all visible without scrolling.

•Notes

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11 Sorting & Subtotalling data

By the end of this section you will be able to:

- **Understand how to lay out a list**
- **Sort data in ascending and descending order**
- **Sort using multiple columns**
- **Add subtotals to a list**

11.1   Lists

Excel's tabular layout makes it an ideal tool to use for managing lists of data. There are many commands that you can use to manipulate list data, which are described in this section, however, before discussing those, it is worth reviewing the best way to lay out a list in Excel.

Do

Make the first row of your list the column headings that describe the data.

Do not

Use ambiguous words as column headings (e.g. SUM, SUBTOTAL) as Excel may confuse them with functions or names that you have defined.

Use punctuation in column headings.

Leave a gap between the column headings and the first row of data.

Leave blank rows between list data.
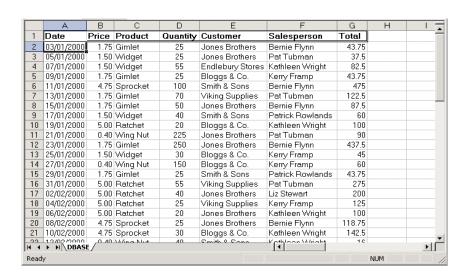
Figure 59 - *Correct list layout*

Sorting list data

Where you have lists with lots of columns and rows, you may need to sort by more than one column. For example the list of orders below has been sorted by customer, within the customer grouping, you may want to sort by Product and then by Salesperson.

Date	Price	Product	Quantity	Customer	Salesperson	Total
01/01/97	1.75	Gimlet	25	Barkers	Tom	43.75
03/01/97	1.50	Widget	25	Barkers	Eleanor	37.5
05/01/97	1.50	Widget	55	Barkers	Carol	82.5
07/01/97	1.75	Gimlet	25	Barkers	David	43.75
13/01/97	1.75	Gimlet	50	Barkers	Tom	87.5
17/01/97	5.00	Ratchet	20	Barkers	Carol	100
19/01/97	0.40	Wing Nut	225	Barkers	Eleanor	90
26/03/97	5.00	Ratchet	65	Barkers	Caroline	325
03/04/97	4.75	Sprocket	20	Barkers	Caroline	95
07/04/97	5.00	Ratchet	70	Barkers	David	350
13/04/97	4.75	Sprocket	10	Barkers	Tom	47.5
23/04/97	5.00	Ratchet	40	Barkers	Sharon	200
25/04/97	4.75	Sprocket	30	Barkers	Elliott	142.5
29/04/97	1.75	Gimlet	25	Barkers	Elliott	43.75
11/01/97	1.75	Gimlet	70	Dingles	Eleanor	122.5
29/01/97	5.00	Ratchet	55	Dingles	Eleanor	275

☞ **To sort using the Sort dialog:**
   Mouse

- Click in the middle of the list you want to sort.
- Choose Data from the menu bar and then Sort. The following dialog box will appear:
- Excel recognises the column headings from your list and allows you to pick them from drop-down list boxes in the dialog. Choose the main sort order for your data by clicking the drop-down list arrow to the right of the **Sort by** list and picking the column you want to use.
- Set **Ascending** or **Descending** order for the sort by clicking the relevant option.
- Choose sub sort columns and orders by picking the column heading from the **Then by** lists and clicking the **Ascending/Descending** option.
- Click OK to perform the sort.

When using the Sort tools, Excel can sort using up to 3 columns in any one sort operation. If your data is very complex, you could carry out a sequence of sorts starting with the least important column and ending with the most important one to achieve the desired results.

Subtotals

Excel can automatically add subtotals to a list of data. Your subtotals can sum numeric data or find highest and lowest values and averages. You can also count the number of rows in a group.

Organising the list for subtotals

When you issue the subtotals command, Excel will need to know where to add the subtotals in. In the example below, if you wanted to see subtotals for the revenue generated per product, you would first need to sort the list into Product order. Similarly, if you wanted to see how much each salesperson had sold, you would sort the list by Salesperson before adding the subtotals in.

Date	Price	Product	Quantity	Customer	Salesperson	Total
01/01/97	1.75	Gimlet	25	Barkers	Tom	43.75
03/01/97	1.50	Widget	25	Barkers	Eleanor	37.5
05/01/97	1.50	Widget	55	Barkers	Carol	82.5
07/01/97	1.75	Gimlet	25	Barkers	David	43.75
13/01/97	1.75	Gimlet	50	Barkers	Tom	87.5
17/01/97	5.00	Ratchet	20	Barkers	Carol	100
19/01/97	0.40	Wing Nut	225	Barkers	Eleanor	90
26/03/97	5.00	Ratchet	65	Barkers	Caroline	325
03/04/97	4.75	Sprocket	20	Barkers	Caroline	95
07/04/97	5.00	Ratchet	70	Barkers	David	350
13/04/97	4.75	Sprocket	10	Barkers	Tom	47.5
23/04/97	5.00	Ratchet	40	Barkers	Sharon	200
25/04/97	4.75	Sprocket	30	Barkers	Elliott	142.5
29/04/97	1.75	Gimlet	25	Barkers	Elliott	43.75
11/01/97	1.75	Gimlet	70	Dingles	Eleanor	122.5
29/01/97	5.00	Ratchet	55	Dingles	Eleanor	275

☞ **To add subtotals to a list:**

Mouse

- Once you have sorted the list, choose Data from the menu bar and then Subtotals. The following dialog box will appear:
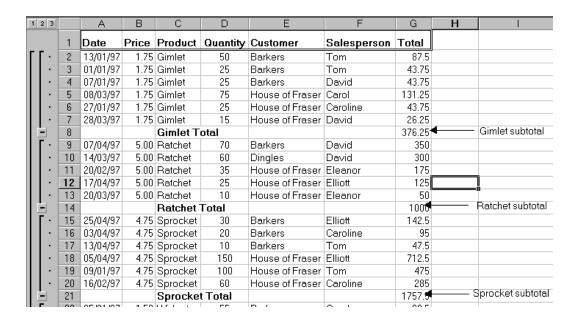
- Click the drop-down list arrow to the right of the At each change in box to display your column headings. Pick the heading according to which column you have used to group the data.
- Click the drop-down list arrow to the right of the Use function box to display a list of functions you can use to summarise data in your list. Click the function that you want.
- Use the up and down arrows in the Add subtotal to list to set which columns you want to add the subtotals to. Check the box next to the column to subtotal. You can add subtotals to more than one column.
- Set options for the new subtotals using the check boxes at the bottom of the dialog.
- If you want each subtotalled group on a separate page, check Page Break between groups.
- Summary below detail adds subtotals and an overall total *below* the groups of data rather than above.
- Replace current subtotals ensures that the new subtotals overwrite any existing ones.
- Click OK to apply the subtotals.

Date	Price	Product	Quantity	Customer	Salesperson	Total	
13/01/97	1.75	Gimlet	50	Barkers	Tom	87.5	
01/01/97	1.75	Gimlet	25	Barkers	Tom	43.75	
07/01/97	1.75	Gimlet	25	Barkers	David	43.75	
08/03/97	1.75	Gimlet	75	House of Fraser	Carol	131.25	
27/01/97	1.75	Gimlet	25	House of Fraser	Caroline	43.75	
28/03/97	1.75	Gimlet	15	House of Fraser	David	26.25	← Gimlet subtotal
07/04/97	5.00	Ratchet	70	Barkers	David	350	
14/03/97	5.00	Ratchet	60	Dingles	David	300	
20/02/97	5.00	Ratchet	35	House of Fraser	Eleanor	175	
17/04/97	5.00	Ratchet	25	House of Fraser	Elliott	125	
20/03/97	5.00	Ratchet	10	House of Fraser	Eleanor	50	← Ratchet subtotal
25/04/97	4.75	Sprocket	30	Barkers	Elliott	142.5	
03/04/97	4.75	Sprocket	20	Barkers	Caroline	95	
13/04/97	4.75	Sprocket	10	Barkers	Tom	47.5	
09/04/97	4.75	Sprocket	60	Dingles	Carol	285	
30/03/97	4.75	Sprocket	25	Dingles	David	118.75	
28/02/97	4.75	Sprocket	10	Dingles	Sharon	47.5	
05/04/97	4.75	Sprocket	150	House of Fraser	Elliott	712.5	
09/01/97	4.75	Sprocket	100	House of Fraser	Tom	475	
16/02/97	4.75	Sprocket	60	House of Fraser	Caroline	285	← Sprocket subtotal
05/01/97	1.50	Widget	55	Barkers	Carol	82.5	

Example:

- To insert the subtotals shown left:-
- Sort the list by product. Choose Data, Subtotals.
- **At each change in** *Product*, **Use function** *Sum*, **Add subtotal** to *Total*
- The result can be seen overleaf.

1 2 3		A	B	C	D	E	F	G	H	I
	1	Date	Price	Product	Quantity	Customer	Salesperson	Total		
	2	13/01/97	1.75	Gimlet	50	Barkers	Tom	87.5		
	3	01/01/97	1.75	Gimlet	25	Barkers	Tom	43.75		
	4	07/01/97	1.75	Gimlet	25	Barkers	David	43.75		
	5	08/03/97	1.75	Gimlet	75	House of Fraser	Carol	131.25		
	6	27/01/97	1.75	Gimlet	25	House of Fraser	Caroline	43.75		
	7	28/03/97	1.75	Gimlet	15	House of Fraser	David	26.25		
−	8			**Gimlet Total**				376.25		← Gimlet subtotal
	9	07/04/97	5.00	Ratchet	70	Barkers	David	350		
	10	14/03/97	5.00	Ratchet	60	Dingles	David	300		
	11	20/02/97	5.00	Ratchet	35	House of Fraser	Eleanor	175		
	12	17/04/97	5.00	Ratchet	25	House of Fraser	Elliott	125		
	13	20/03/97	5.00	Ratchet	10	House of Fraser	Eleanor	50		
−	14			**Ratchet Total**				1000		← Ratchet subtotal
	15	25/04/97	4.75	Sprocket	30	Barkers	Elliott	142.5		
	16	03/04/97	4.75	Sprocket	20	Barkers	Caroline	95		
	17	13/04/97	4.75	Sprocket	10	Barkers	Tom	47.5		
	18	05/04/97	4.75	Sprocket	150	House of Fraser	Elliott	712.5		
	19	09/01/97	4.75	Sprocket	100	House of Fraser	Tom	475		
	20	16/02/97	4.75	Sprocket	60	House of Fraser	Caroline	285		
−	21			**Sprocket Total**				1757.5		← Sprocket subtotal
		05/01/97	1.50	Widget	55	Barkers	Carol	82.5		

Summarising a subtotalled list

Once you have added subtotals to a list, Excel gives you tools for collapsing the list so that you only see the grand total or subtotals. The outline symbols that appear to the left of the row numbers allow you to hide and show detail rows as needed.

Outline symbol

☞ **To hide detail for a group:**

Mouse

- Click the minus symbol that appears to the left of the row number where the grand/subtotal sits. All bracketed rows will be hidden.

    You can see where the hidden rows are because the outline symbol displays a plus sign.

☞ **To show detail for a group:**
Mouse

- Click the plus symbol that appears to the left of the row number where the grand total/subtotal sits. All hidden rows will reappear.

Show and hide by level

[1] [2] [3] When you add subtotals to a list, Excel gives you an overall total and subtotals per groups of sorted data. In the outline, Excel numbers these levels 1 for the grand total, 2 for the subtotals and 3 for the detail.

The numbers appear above the outline symbols and can be used to collapse and expand the rows by level.

☞ **To show only an overall total:**
Mouse

1 2 3		A	B	C	D	E	F	G
	1	Date	Price	Product	Quantity	Customer	Salesperson	Total
+	38			Grand Total				4519.8

- Click the button marked 1 above the outline symbols.
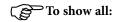
☞ **To show only totals:**

Mouse

1 2 3		A	B	C	D	E	F	G
	1	Date	Price	Product	Quantity	Customer	Salesperson	Total
+	8			Gimlet Total				376.25
+	14			Ratchet Total				1000
+	21			Sprocket Total				1757.5
+	30			Widget Total				1110
+	37			Wing Nut Total				276
−	38			Grand Total				4519.8

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- Click the button marked 2 above the outline symbols.

☞ **To show all:**

Mouse

- Click the button marked 3 above the outline symbols.

Remove subtotals

If you want to remove subtotals from a list, you can use the Remove subtotals command.

☞ **To remove subtotals:**

Mouse

- Click in the list with the subtotals
- Choose Data from the menu bar and click Subtotals. From the resulting dialog box, click the Remove All button. Any totals and outlines will disappear.

☺ **Useful Information**

Sort list data with sort tools

You can sort data in a list in ascending or descending order. The Standard toolbar has buttons that you can use to specify the sort order, but you need to specify which column contains the data that you want to sort by.

👉 **To sort list data using the sort tools:**

Mouse

- Select the data you want to sort.

    Do not include the column headings!

- The active cell will be visible within the selection as the white cell. Move the active cell across to the column that you want to sort by using the [TAB] key.

    If you need to move back, use [SHIFT][TAB].

Active cell in
Customer
column

Date	Price	Product	Quantity	Customer	Salesperson	Total
01/01/97	1.75	Gimlet	25	Barkers	Tom	43.75
03/01/97	1.50	Widget	25	Barkers	Eleanor	37.5
05/01/97	1.50	Widget	55	Barkers	Carol	82.5
07/01/97	1.75	Gimlet	25	Barkers	David	43.75
09/01/97	4.75	Sprocket	100	House of Fraser	Tom	475
11/01/97	1.75	Gimlet	70	Dingles	Eleanor	122.5
13/01/97	1.75	Gimlet	50	Barkers	Tom	87.5
15/01/97	1.50	Widget	40	House of Fraser	Caroline	60
17/01/97	5.00	Ratchet	20	Barkers	Carol	100
19/01/97	0.40	Wing Nut	225	Barkers	Eleanor	90
21/01/97	1.75	Gimlet	250	Barkers	Tom	437.5
23/01/97	1.50	Widget	30	Barkers	David	45
25/01/97	0.40	Wing Nut	150	Barkers	David	60
27/01/97	1.75	Gimlet	25	House of Fraser	Caroline	43.75

- To sort the selected rows in ascending order using the active cell column, click the Sort Ascending button from the Standard toolbar.

Or

- To sort the selected rows in descending order using the active cell column, click the Descending button from the Standard toolbar.

•Notes

12 Customisation

By the end of this section you will be able to:

- **Add and remove toolbar buttons**
- **Set display options**
- **Set edit options**
- **Switch on Lotus navigation and help options**

12.1   Customising Excel

You can set up the Excel environment in the way that best suits you using the Options dialog. You can also combine the commands that you use most frequently on the toolbar rather than accepting the default buttons that come as standard with Excel.

Customise toolbars

If you never use certain buttons, there is no point in keeping them on a toolbar. Likewise, there may be commands that you use frequently that do not currently have a button on the toolbar. You can add and remove buttons to and from the toolbars by customising them. Excel will then keep your set of buttons for future work sessions.
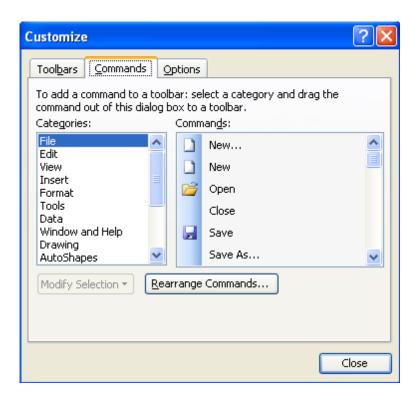
☞ **To customise toolbars:**
   Mouse

- Click the right mouse button anywhere over a displayed toolbar and choose Customise from the resulting short-cut menu. The following dialog box will appear:

Figure 60 - *Customise dialog*

- Click the Commands tab to see a list of commands organised by category that you can add as buttons to your toolbars.

- Click the category that the command you want falls under and scroll the Commands list down until you can see the command.
- Click and drag the command's icon up to the toolbar - an I beam denotes where it will slot in. Release the mouse when you have the correct position. The icon will appear on the toolbar.

> *While the Customise dialog is open, you can remove toolbar buttons that you do not use by dragging them off the toolbar.*
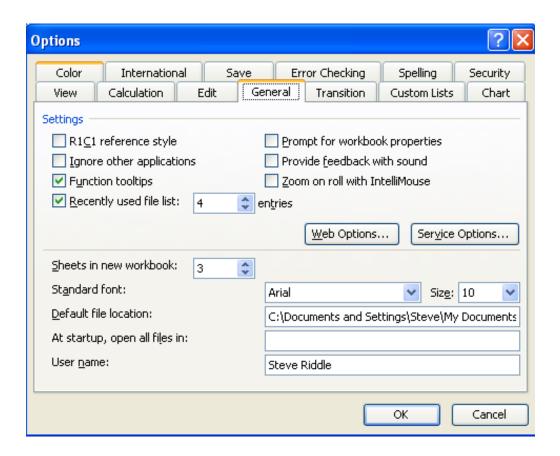
12.2   Set Options

You can set options in Excel to control what appears on screen, how Excel edits data and also allow you to use some Lotus functionality within the Excel environment.

☞ **To access the Options dialog:**
Mouse

- Choose Tools from the menu bar and select Options. The following dialog box will appear:
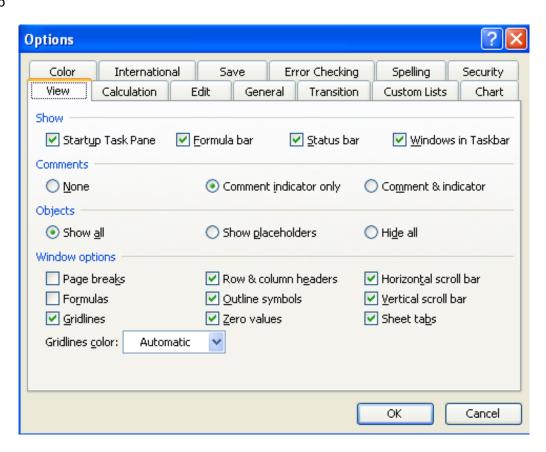
General tab

Recently used file list – choose the number of recently opened files you would like listed at the bottom of the file menu by clicking the up and down arrows to the right of the entries box.

Sheets in new workbook – Select the number of sheets for future new workbooks by clicking the up and down arrows to increase or decrease the figure.

Font & Size – Select a default font and size for all new workbooks by picking a font name and point size from the list boxes.

Default file location – specify where you want Excel to default to when you open and save files by typing a location.
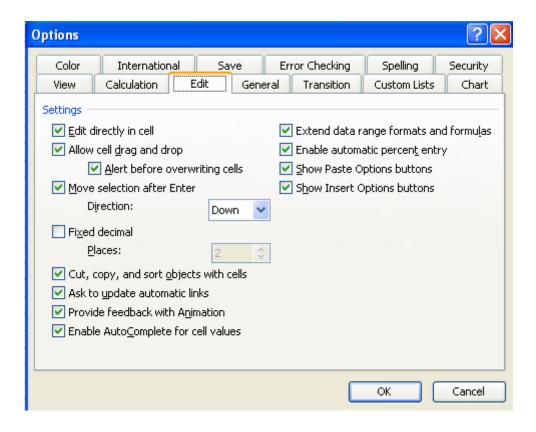
View tab

Show – use the Formula Bar and Status Bar check boxes to switch them on and off from the screen display.

Window Options – You can set options for window display (e.g. switch scroll bars on and off) using these check boxes.
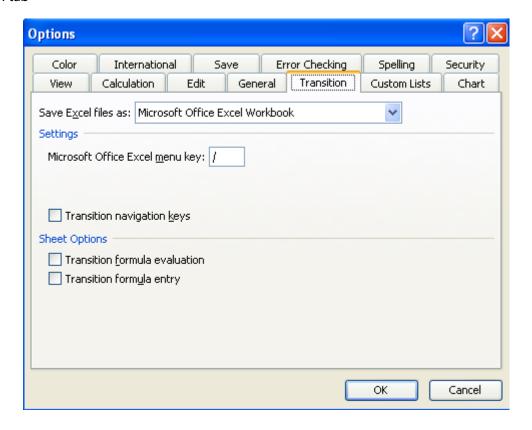
Edit tab

Edit in cell – when checked, allows you to double-click a cell to edit it.

Allow cell drag and drop – when checked, allows items to be moved and copied with the mouse.

AutoComplete – Excel offers to complete entries made in a column based on data already in the column if this option is checked.
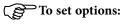
Move selection after enter – Uncheck to stop Excel moving the active cell when you press [ENTER]. Use the Direction list to specify an alternative direction to move the cell when the [ENTER] key is pressed.

Transition tab

Settings – Select Lotus 1-2-3 help to call up a help system if you use the forward slash [/].

Transition navigation keys – Check this box to use Lotus movement key combinations in Excel.

☞ **To set options:**
　　Mouse
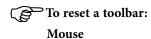
- Access the Options dialog.
- Move between the tabs setting the options as required.
- Click OK to keep the new settings.
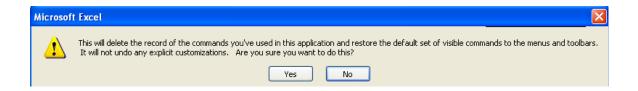
☺　　**Useful Information**

Reset toolbars

You can reset any toolbar back to its default set of buttons.

☞ **To reset a toolbar:**
　　Mouse

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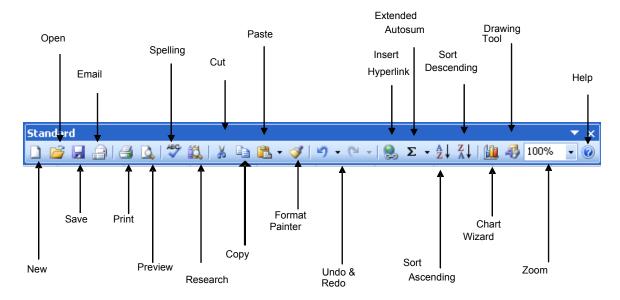
- Right-click over a visible toolbar and choose Customise from the resulting short-cut menu.
- Select the toolbar you want to reset from the list and click the Reset button. Excel will ask you to confirm the reset with the following dialog:
- Click OK to confirm and then Close to close the Customise dialog.

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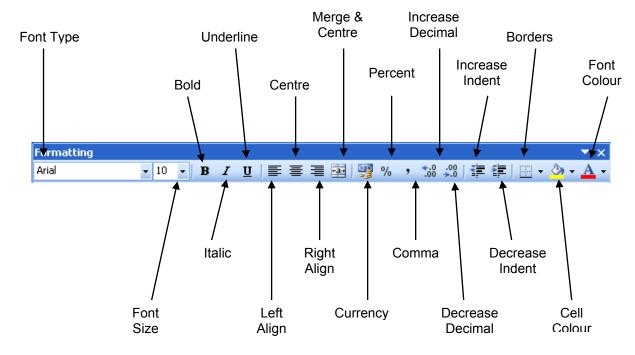
•Notes

Appendix One: Toolbars

Standard Toolbar
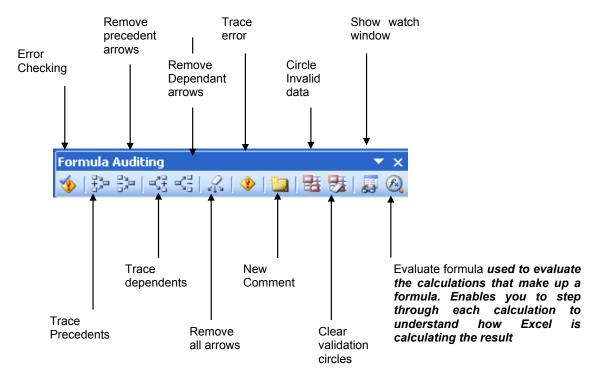
Formatting Toolbar

Auditing Toolbar

This toolbar provides you with a set of tools to link auditing features. It also exposes other functionality such as toggling to display all formulas in the worksheet


Movement keys

To Move	Do this
One Cell Up, Down, Left or Right	[←][→][↑][↓]
Up One Screen	[PAGE UP]
Down One Screen	[PAGE DOWN]
Left One Screen	[ALT][PAGE UP]
Right One Screen	[ALT][PAGE DOWN]
To Edge of Worksheet (or current block of data)	[CTRL][Relevant Arrow Key]
To a Particular Cell	[F5] then type the reference for the cell required and press Return
To column A in the current row	[HOME]
To cell A1	[CTRL][HOME]

Mouse Selection methods

To select	Do this
A single cell	Click the cell, or press the arrow keys to move to the cell.
A range of cells	Click the first cell of the range, and then drag to the last cell.
All cells on a worksheet	Click the Select All button.
Nonadjacent cells or cell ranges	Select the first cell or range of cells, and then hold down [CTRL] and select the other cells or ranges.
A large range of cells	Click the first cell in the range, and then hold down [SHIFT] and click the last cell in the range. You can scroll to make the last cell visible.
An entire row	Click the row number.
An entire column	Click the column letter.
Adjacent rows or columns	Drag across the row or column headings. Or select the first row or column; then hold down SHIFT and select the last row or column.
Nonadjacent rows or columns	Select the first row or column, and then hold down [CTRL] and select the other rows or columns.
More or fewer cells than the active selection	Hold down SHIFT and click the last cell you want to include in the new selection

Selection keys

To select	Do this
The active cell plus one Cell up, down, left or right	[SHIFT][←],[SHIFT][→],[SHIFT][↑],[SHIFT][↓]
To Edge of Worksheet (or current block of data)	[SHIFT][CTRL][Relevant Arrow Key]
The current region	[CTRL][*] (use the asterisk from the number pad)
[Ctrl][SPACEBAR]	Whole Column
[Ctrl][A]	Whole Worksheet

Keyboard shortcuts for formatting

To	Press
Display the Cells command (Format menu)	[CTRL][1]
Apply the General number format	[CTRL][SHIFT][~]
Apply the Currency format with two decimal places (negative numbers appear in parentheses)	[CTRL][SHIFT][$]
Apply the Percentage format with no decimal places	[CTRL][SHIFT][%]

Apply the Exponential number format with two decimal places	[CTRL][SHIFT][^]
Apply the Date format with the day, month, and year	[CTRL][SHIFT][#]
Apply the Time format with the hour and minute, and indicate A.M. or P.M.	[CTRL][SHIFT][@]
Apply the Number format with two decimal places, 1000 separator, and – for negative values	[CTRL][SHIFT][!]
Apply the outline border	[CTRL][SHIFT][&]
Remove all borders	[CTRL][SHIFT][_]
Apply or remove bold formatting	[CTRL][B]
Apply or remove italic formatting	[CTRL][I]
Apply or remove an underline	[CTRL][U]
Apply or remove strikethrough formatting	[CTRL][5]
Hide rows	[CTRL][9]
Unhide rows	[CTRL][SHIFT][9]
Hide columns	[CTRL][0]
Unhide columns	[CTRL][SHIFT][+]

Glossary

Absolute reference	*A reference that remains fixed to a particular cell or range when the formula is copied.*
AutoComplete	*Option that causes Excel to automatically complete a cell entry that you start typing based on other entries in the column. Can be switched off using Tools and Options.*
Cell	*The rectangle where two rows and columns intersect. A cell can contain up to 32,000 characters.*
Cell reference	*The position of a particular cell denoted by a column letter and a row number (e.g. A1).*
Formula	*A calculation that you enter in a worksheet cell. All formulae begin with an equals (=) sign.*
Function	*A built-in formula that you can type or paste into a cell. Excel contains a huge number of functions split into categories based on the tasks that they perform.*
Name	*A way of referring to a cell or a range without using "A1" style referencing. You can allocate meaningful names to cells using the Name box.*
Print Area	*Name given to the area of the worksheet that will print. Can be set and cleared using an option on the File menu.*
Range	*A cell or group of cells (generally used when selecting cells to be used in formulae or for formatting).*
Range reference	*The syntax for referring to specific cells (e.g. B2:B10 – means all cells in the range B2 to B10). A comma between range references allows you to refer to ranges that are non-adjacent (e.g. B2:B10, B15:B22 – means all cells from B2 to B10 and all cells from B15 to B22).*
Running marquee	*The flashing dotted line that Excel displays around the range you select when you carry out certain tasks (copy, cut, enter formulae by pointing etc.)*
Workbook	*Excel file that can have multiple pages. Saved with .XLS extension.*
Worksheet	*One page within a workbook. Denoted by the tabs that appear towards the bottom of the screen (Sheet 1, Sheet 2 etc.). Sheet tabs can be renamed.*